

Production and ATS Issues

(Beginning October 2011 through February 2012)

March 2, 2012

Item#	Issue/Question	Date Opened	Resolution	Environment ATS or Production	Status
1	Should the Schedule E, page 1, Line A checkbox be mandatory when there are only activities reported on Schedule E, page 2, such as in ATS tests #5 & 7? Currently the schema says it is mandatory even when there are no rental or royalty properties being reported on Schedule E, page 1.	10/31/11	The Schedule E (1040), Line will be made optional. A correction will be delivered in new future schema package.	ATS	Closed 11/3/2011
2	Form 2290- Business Rule 2290-047 appears to have an issue. What is the intent of this rule?	10/31/11	This rule was enabled 11/1/11. Intuit verified that it is correctly setting today.	ATS	Closed 11/1/2011
3	Form 1120 –F7004. Two schemas are posted. Version 1.0 indicates that it is invalid for production. Version 2 indicates that it will not be effective until 12/19. Please confirm that we should be using Version 1.0 for ATS testing.	11/1/11	A Quick Alert was issued indicating that through December 18, 2011, BMF should use TY2010 v. 2.1 schema package. Starting on December 19, 2011 use TY2011 v 2.0 schema package.	ATS	Closed 11/2/2011
4	Will testers be required to retest on TY2011 V.2.0 if they have already passed the TY2010 V2.1 package?	11/2/2011	Transmitters will not be required to retest with TY2011 version 2, if they pass with TY2010 version 2.1; however, it is highly encouraged they do so	ATS	Closed 11/4/2011
5	BMF Shutdown – What is the BMF shut down date and time? Michigan	11/1/11	BMF will Shut down on December 27, 2011, 11:59am Eastern. A Quick Alert will be issued.	ATS	Closed 11/2/2011
6	When will the following 5 additional business rules be disabled? (1040-064-001, 1040-277, 2350-001, SA-1040-1=013, SA-1040-016) CCH	11/1/11	The following Business Rules were disabled on 11/3/2011, they are: 1040-151-02, 152-02, 153-02, 163-02, 165-02 and 1040A-046, 8865-203, 8891F-005. These rules were disabled 11/3	ATS	Closed 11/3/2011

7	John from Liberty – Test #6, Form 4972, Line 30, Answer Key states this should equal 110. According to their figures the answer equals 55. Is there an error in this scenario?	11/2/2011	The math computation has been reviewed and Scenario #6 will be corrected to show Form 4972, Line 30 should be 55.	ATS	Closed 11/3/2011
8	John from Online Taxes – There seems to be a disconnect on what issues are to be directed to the MeF Mailbox and what issues directed to the e-Help Desk.	11/2/2011	BMF forms in production or ATS related issues should be directed to the e-Help Desk. 1040 or MeF System issues should be directed to the W&I MeF Mailbox.	ATS	Closed 11/2/2011
9	John Online Taxes and Rep. from CCH raised the concern of 2/3 days to resolve e-cases.	11/2/2011	We are committed to returning responses in the earliest possible timeframe. We will review each of the reported delays to determine the root cause and try to expedite a response. The reported delay was attributed to a system issue which has now been resolved.	ATS	Closed 11/3/2011
10	1040 testing package, Form 5695, Line 52, there is a schema problem with reporting the amount of credit.	11/3/2011	Please use the element name CreditsFromFormAmount to report the amount of credit for line 52 of form 5695. Revised test scenario has been posted to irs.gov	ATS	Closed 11/4/2011
11	Scenario #4 is being revised. There will be 2 more dependents added.	11/3/2011	The revised scenario #4 will be published by tomorrow, 11/4/2011 COB	ATS	Closed 11/3/2011
12	Scenario 7 has an incorrect calculation for Form 1120-F, Sch H, Line 7	11/3/2011	Software developers are requested to use 30,000,000 for Form 1120-F, Sch H, lines 1a and 3 if they are having problems with transmitting the information in the scenario. There will be a correction in an upcoming update to the Publication 4162. Assistors should accept either amount in testing.	ATS	Closed 11/4/2011
13	Scenarios Changed/Updated for Testing	11/7/2011	The following Scenarios have been revised. Details on the revisions can be found at the ATS Known Issues Site. Scenario #4 Scenario #5 Scenario #6 Scenario #7 Scenario #15	ATS	Closed 11/7/2011

14	Question regarding Scenario #6 (1099R and F4972)	11/9/2011	1099R box 1 divided by percentage in box 9a is the entry for F4972 line 8.	ATS	Closed 11/9/2011
15	Question regarding a checkbox for income taxes or general sales taxes on Schedule A	11/9/2011	Helpdesk responded, checkbox was not checked, schema v2.0 has no provision for this; will advise helpdesk.	ATS	Closed: 11/9/2011
16	Scenario #7 published file did not reflect alimony on 1040 lines 31a and b.	11/9/2011	The information can be found on the summary page.	ATS	Closed 11/10/2011
17	Should the \$500 dollar amount in Scenario #8 (from F8283), Schedule A line 17 be forced?	11/9/2011	Technically, Form 8283 is only required if amount is <u>over</u> \$500. The Helpdesk will be advised.	ATS	Closed 11/9/2011
18	Question on the workaround for Form 5695 entry flowing to Form 1040 via the Form 1040 element CreditsFromFormsAmt.	11/9/2011	For ATS Test Scenario 6 and the credit from Form 5695 flowing to Form 1040; use the Form 1040 2011V2.0 schema element CreditsFromFormsAmt to report the credit amount from Form 5695.	ATS	Closed 11/21/2011
19	Should Elements 'RecipientFirstAdditionalIDNum' and 'RecipientSecondAdditionalIDNum' be optional?	11/14/2011	Yes. Corrections to the schema have been submitted but have not yet been implemented. Corrections will be made in a future schema version. Additionally, a correction was submitted to change 'RecipientsName' and 'RecipientsIDNumber' Min occurrences from 0 to 1.	ATS	Closed 11/16/2011
20	Form 8862: In the V3 schema the Groups "EICEligCImLiveWithPrsnChld2Grp" and "EICEligCImLiveWithPrsnChld3Grp" are mandatory. These should not be mandatory, for the same reason that Group "EICEligCImLiveWithPrsnChld1Grp" was changed from mandatory to not required.	11/16/2011	Updated: Form 8862 schema will be corrected to allow optional entries in EICEligCImLiveWithPrsnChld2Grp and EICEligCImLiveWithPrsnChld3Grp	ATS	Closed 11/18/2011
21	Form 8862: In the V3 schema "EICEligCImLiveWithChild1AddrGrp" is mandatory. This makes it impossible to pass validation, if you are filling out Form 8862 Without a Qualifying Child and only need to fill out Part I and Page 2, Part III.	11/16/2011	Form 8862 schema will be corrected to allow an optional entry in EICEligCImLiveWithChild1AddrGrp	ATS	Closed 11/28/2011

22	<p>Form 8582, Worksheet 4: The 2010 instructions (2011 instructions are not yet released) say that you must complete 2 separate Worksheets 4, if there are amounts on both lines 10 and 14 of Form 8582. The schema only allows for 1 copy of Worksheet 4 which would be the "ParentWrkshtAllowanceGrp".</p> <p>Will the schema be revised to allow up to 2 copies? OR Do you expect the items in both copies of Worksheet 4 to be listed within the 1 existing "ParentWrkshtAllowanceGrp" and the totals for both copies to be added and reported in the 3 total fields under "ParentWrkshtAllowanceGrp"?</p>	11/16/2011	<p>The "ParentWrkshtAllowanceGrp" incorporates all of the individual Worksheet 4, along with the totals of all of the individual worksheets. Therefore, both copies of Worksheet 4 is to be listed within the 1 exiting "ParentWrkshtAllowanceGrp" and the totals for both copies are to be added and reported in the 3 total fields under "ParentWrkshtAllowanceGrp".</p> <p>.</p>	ATS	Closed 11/28/2011
23	<p>The following rules are being disabled in ATS : F1040-066-02, F1040-082, F1040-134, F1040-215, F1040-217, F1040-218, F1040-219, F1040-220, F1040A-025, F1040A-092, F1040A-157, 1040EZ-053, F1040SSPR-025, F1040SSPR-026, F1040SSPR-041, F1040SSPR-042, F1040SSPR-045</p>	11/18/2011	<p>The ATS Business Rules To Be Disabled Link has been updated.</p>	ATS	Closed 11/21/2011
24	<p>Scenario #5 – Incorrect Schedule J</p>	11/18/2011	<p>This has been corrected on irs.gov.</p>	ATS	Closed 11/18/2011
25	<p>Concerns were expressed regarding the time lapse between calling the e-Help Desk and the assistor picking up.</p>	11/18/2011	<p>A representative from the e-Help Desk participated on the call to report on the e-Help system. The system is working fine; however developers and other users of the system must keep in mind that Monday is the day with the highest call volume of the week.</p>	ATS	Closed 11/18/2011
26	<p>The form 1040 instructions includes an option of "NRA" for the Spouse SSN. Will the MeF schema be updated?</p>	11/18/2011	<p>Yes. The MeF schema will be changed to provide a choice between Spouse SSN and the literal NRA.</p>	ATS	Closed 11/28/2011

27	The following rules were disabled in ATS 12/7/2011: F6781-023 and 1040A-155	12/7/2011	The ATS Business Rules To Be Disabled Link has been updated	ATS	Closed 12/7/2011
28	The following rule was disabled on 12/12/2011: F1040-357	12/12/2011	The ATS Business Rules To Be Disabled Link has been updated	ATS	Closed 12/12/2011
29	Business MeF Production Shutdown/Cut Over Schedule.	12/12/2011	<p>Shutdown is scheduled to begin on Tuesday, December 27, 2011 at 11:59 am, and end on Monday, January 09, 2012 at 9:00 am, Eastern</p> <p>Shutdown Deadlines on Tuesday, December 27, 2011 Eastern Time</p> <p>Transmitters:</p> <p>Transmitting Submissions (State & Federal) 10:00 am Retrieving Acknowledgements 11:59 am</p> <p>States:</p> <p>Transmitting Acknowledgements 11:30 am</p> <p>MeF Assurance Testing System (ATS) Schedule: ATS will remain open throughout this production shutdown/cut over period (12/27/2011 - 01/09/2012).</p> <p>Production Start Up on Monday, January 09, 2012 Eastern Time Transmitters & States 9:00am</p>	ATS	Closed 12/12/2011
30	Has there been problems with ATS testing for the ETD Forms 56, and 9465 (tests 14 and 16)?	12/22/2011	<p>The R0000-904-01 was erroneously not included in the list of rules to be disabled for ATS...we will send a request to have this rule disabled. The e-Help desk should disregard this reject when reviewing ATS submissions.</p> <p>The 1040 Modernized e-File Program (MeF) has disabled Business Rule R0000-904-01 in the ATS system as of 10:00am Eastern 12/23/2011.</p>	ATS	Closed 12/23/2011

31	F4835-001 The sum of all Forms 4835, Line 32 'NetFarmRentalIncomeOrLossAmt' must be equal to Schedule E (Form 1040), Line 40 'NetFarmRentalIncomeOrLossAmt'.	12/21/2011	Rule has been disabled. A correction has been submitted and the rule will be re-enabled	ATS	Closed 12/22/2011
32	IND-689 - The year of the 'PrimarySignatureDate' in the Return Header must be equal to the processing year	12/21/2011	Rule has been disabled, will remain disabled in ATS only	ATS	Closed 12/22/2011
33	SC-F1040-011 - If Schedule C (Form 1040), Line 1a 'MerchantCardAndThrdPrtyPymtAmt' has a non-zero value, then Line 1c 'StatutoryEmployeeW2IncomeAmt' must be equal to zero if an amount is entered	12/21/2011	Rule has been disabled. Rule will not be implemented – validation not required by IRS. This rule will be deleted in Release 8.	ATS	Closed 12/22/2011
34	Invalid Certificate Path error	12/29/2011	The "Invalid Certificate Path" error that transmitters to the Modernized e-File (MeF) system have been experiencing has been resolved. Important URL Changes: Please temporarily use the following la.alt URL for ATS testing until January 8th 2012. Please plan to switch back to using the la URL after noon, Eastern on January 8th. la.alt.www4.irs.gov/a2a/mef/	ATS	Closed 12/29/2011
35	Rule number 2441-009-01 in ATS will be disabled.	1/2/2012	This rule has been disabled. The MeF ATS page on IRS.gov will be updated when this rule is disabled.	ATS	Closed 1/5/2012
36	F1040-027-01 - IMF Returns, all SSN's (other than Primary and Secondary) are rejecting for not being within the valid ranges. Test 1037	1/02/2012	This rule has been disabled. Please refer to the Tax Year 2011 1040 Assurance Testing System Disabled Business Rules File for a complete listing of Disabled Rules. This issue is being addressed. MeF ATS page on IRS.gov will be updated once the issue has been resolved.	ATS	Closed 1/5/2012

37	The following rules are being disabled in ATS: F1040-006-01 F1040-037-01, F1040-038-01, F1040-039-01, F1040-040-01, F1040-394, F1040A-032, F1040A-033, F1040A-034, F1040A-035, F1040A-193, F1040A-260, F8826-001, F8941-006, F8941-007, IND-178, IND-179, IND-900.	1/03/2012	The ATS Business Rules To Be Disabled Link has been updated	ATS	Closed 1/5/2012
38	. The following Business Rules have been disabled: F2441-009-01, F1040-027-01, F1040-189, F1040-224, F1040-386, and F1040-387.	1/05/2012	The Tax Year 2011 1040 Assurance Testing System Disabled Business Rules File has been updated	ATS	Closed 1/5/2012
39	The following Business Rules have been disabled for TY2011. F4136-027, F4136-028, F4136-029, F4136-030, F4136-031, F4136-042, F4136-043, F4136-044, F4136-010, F4136-006, F4136-015	1/10/2012	A correction will be submitted for TY2012.	Production	Closed 1/10/2012

40	Three submissions received during MeF Hub erroneously rejected when the withholding was "0" and no income was reported on the return. The rules are missing the exception to bypass if withholding is "0" or not present	1/12/2012	<p>Resolution of the problem is to add the following Implementation Note to the rules listed below: If 'WithholdingTaxAmt' is equal to "0" or is not present, then the rule should be bypassed.</p> <p>1040-071-01 1040A-064 1040EZ-028 The business rules were corrected in Patch 9.</p> <p><u>Update as of 2/2/2012:</u> We will be requesting modification to the implementation note for Business Rule F1040-071-01 to avoid numerous erroneous rejections when a Net Operating Loss is reported on the Form 1040 schema and not in the Other Income Type Statement.</p> <p>We will also be creating a new business rule to avoid returns falling out to ERS (EC 218)</p>	Production	Closed 1/24/2012
41	Has the acknowledgement generation issue that we have experienced over the weekend been resolved?	1/24/2012	The issue was resolved last weekend. All acknowledgements have now been generated and should have been picked up. The status of issues is updated on the MeF Status Page.	Production	Closed 1/24/2012
42	Transmitter reported a large number of R0000-905 errors in MeF which were accepted subsequently through Legacy. How does that happen?	1/24/2012	MeF requires an active accepted ERO role. Legacy requirements may accept different user roles. In all instances that we have reviewed, the R0000- 905 was a valid reject	Production	Closed 1/24/2012
43	Transmitter inquired about R0000-902 errors.	1/24/2012	In all instances we have reviewed, these were valid rejects. The submission was accepted as submitted by one transmitter and then subsequently rejected when the same return was submitted through other vendors. Once a return has been submitted, it will be rejected on second and all subsequent submissions as a duplicate.	Production	Closed 1/24/2012

44	Business Rule F5695-003 contains a listing of all of the elements that are permitted on the second form. The Business Rule omits Line 3e, ExtWdwOrSkylightCostLimitAmt. This line is pre-printed on the form in the amount of \$2000.00.	1/25/2012	<p>Because the Line 3e element is in the Schema, it must also be added to the Business Rule. If the filer has two Form 5695s and includes the entry for Line 3e on their second form, the submission will erroneously reject. Line 3e ExtWdwOrSkylightCostLimitAmt must be added to the Business Rule. There is no workaround that would prevent the erroneous rejects.</p> <p>IRS is requesting implementation of correction for January 29, 2012.</p> <p>Update: This correction was implemented in a patch which was completed on Sunday 2/5/2012.</p>	Production	Closed 2/5/2012
45	<p>1040A/1040EZ/1040SSPR has business rules requiring SpousePINEnteredBy on a joint return. These rules are erroneously rejecting when spouse is deceased. 1040 rule was active in 2010 but not active in 2011 and needs to be implemented for TY2011.</p> <p>1040A-124 1040EZ-071 1040SSPR-028</p>	1/24/2012	<p>These rules can be corrected by adding an implementation note to bypass the rule if SpouseSignature is not present. In researching these rules, it was discovered that form 1040 is missing the rule to check for the SpousePINEnteredBy entry causing the 1040 parent forms to be out of sync with each other.</p> <p>Notified MITS on 01/25/2012 of requirement corrections needed</p> <p>Update: This correction was implemented in a patch which was completed on Sunday 2/5/2012.</p>	Production	Closed 2/5/2012
46	<p>1040-066-02 & 1040-258 are incorrectly set on MeF submissions when Form 8689 is attached. Rules need to be adjusted to account for the amounts from this form. Impact: taxpayer can not file through MeF which will cause a delay in refund/processing return.</p>	1/24/2012	<p>Business Rule 1040-066-02 is causing erroneous rejects. Form 8689 amount should be included in the math check for Line 72 but isn't; therefore, MeF will erroneous reject any filer with a Form 8689 trying to report a payment.</p> <p>Business Rule 1040-258 erroneously includes Form 8689 in Line 72 match check.</p> <p>Changes have been submitted to correct this issue.</p> <p>Update: This correction was implemented in a patch which was completed on Sunday 2/5/2012.</p>	Production	Closed 2/5/2012

47	Schedule A (Form 1040) MeF stylesheet has incorrect verbiage for Line 7. Stylesheet for Line 7 shows Motor Vehicle Tax instead of Personal Property Taxes. This will impact Customer Service's ability to assist taxpayers if they call about their return.	1/24/2012	Changes to correct verbiage on Schedule A (form 1040 stylesheet) have been submitted.	Production	Closed 2/5/2012
48	Question regarding Test Files. How soon can the test files be retrieved?	2/3/2012	The test files can be retrieved 1 hour after sent.	ATS	Closed 2/3/2012
49	What is the status on the exception errors?	2/3/2012	This was an intermittent error reported by a transmitter. There have been no additional reports on exception errors; therefore this issue is considered closed.	Production	Closed 2/8/2012
50	1040 series - Business Rules IND-521 and IND-570 - Rejects are occurring when taxpayers birth date is less than the tax year in the Return Header.		MeF will be adjusting the programming issue causing the erroneous rejects. When the programming is changed, the returns can be resubmitted through MeF. Update: Implemented on 2/19/2012.	Production	Closed 2/19/2012
51	Known Issues Solutions (KIS) – When will the next posting occur?	2/10/2012	The next posting of the KIS chart will more than likely occur before the 4:00 Production Issues call, on Monday February 13, 2012. Update: The KIS chart was uploaded to irs.gov on Monday, February 13, 2012.	Production	Closed 2/13/2012
52	What is the status of the back-logged returns and what is the customer impact?	2/13/2012	Returns that were received from February 6 – 9 were processed on February 11 th and posted on Monday 2/13/12. Any returns processed on 2/13/12, were posted on Tuesday February 14 th . Please keep in mind, when a return has posted this does not mean the return is available.	Production	Closed 2/13/2012
53	What is the status on the backlog of refunds?	2/24/2012	All delayed refunds have been processed. The Helpdesk has been provided with the appropriate script for responding to any questions. We will continue the reinforcement of this response. We apologize for any inconvenience this has caused.	Production	Closed 2/24/2012

The next meeting will be on March 5, 2012 Time: 4:00 pm EST